

All corrections to notes on this calendar should be filed no later than 12 P.M. (Noon) on 5/12/08. Document filed after this time may not be reviewed prior to hearing and could result in a continuance of your case. The update to these notes will be posted in the late afternoon of the following day.

Proposed Local Rules have been posted and can be viewed by visiting
<http://www.sbcounty.gov/courts/pdfs/misc/proposedrules.pdf>

The court welcomes your comments on these proposed rules. Please send them via E-mail to dmeyers@courts.sbcounty.gov or mail them to San Bernardino County Superior Court, 303 West Third Street, Mail Stop 240, San Bernardino, CA 92415. Comments are due by May 12, 2008. If sending comments close to the end of the comment period, please email only.

The Probate Examiners can be reached at ProbateNotes@courts.sbcounty.gov. Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. PLEASE DO NOT SEND EMAILS TO STATE THAT DOCUMENTS HAVE BEEN FILED, TO REQUEST A CONFIRMATION OF WHETHER DOCUMENTS HAVE BEEN RECEIVED, OR TO REQUEST THE CLEARING OF NOTES. No legal or procedural advice may be given.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH **PROBATE**

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0600185

CASE NAME: MTR OF PAULINE LINDENMAN

HEARING:
Accounting Review

COUNSEL:
SUSAN ANN BOWMAN (PET)...HARTNELL, LISTER & MOORE
PAULINE LINDENMAN (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 3/12/07, \$66,000 bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

Clerk to notice bonding company.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0600321

CASE NAME: ABBOTT LIVING TRUST

HEARING:

Hearing re: PTN TO REMOVE SUCCESSOR AND APPT SUCCESSOR TRUSTEE

COUNSEL:

GEORGIA COODY (PET)...ROGER VON KAESBORG

GENERAL INFORMATION:

Continued from 3/5/07 and 5/7/07 at request of counsel. Nothing new filed.

Continued from 11/19/07 at request of counsel. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Petition to Remove Successor Trustee and to Appoint Successor Trustee

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. File certificate of assignment.
2. File copy of trust. Local Rules of Court, Rule 1502.
3. Set forth the name and address of each person entitled to notice. Pr.C. § 17201.
4. Set forth venue facts, as is required by Pr.C. § 17201. File verified supplement.
5. Set forth facts establishing that this petition is authorized under Pr.C. § 17200 et seq. as is required by Pr.C. § 17201. File verified supplement.
6. When was the trust created? Is it irrevocable? When and how did it become irrevocable? File verified supplement.
7. Petitioner alleges that she is a beneficiary of the Abbott Trust. Petitioner alleges that the successor trustee has failed to distribute trust assets according to the trust, but fails to set forth what actions violated the trust distribution requirements and how those actions constituted a violation. Petitioner alleges that the successor trustee is attempting to sell real property of the trust without notice and without providing an inventory or appraisal. Petitioner fails to point out what portion of the trust is violated by this action. Petitioner alleges that the successor trustee taken control of bank accounts belonging to the trust, without notice. Again petitioner fails to set forth what portion of the trust is violated by these actions. Petitioner alleges that the successor trustee has failed to communicate or respond to reasonable

inquires. Petitioner fails to set out what portion of the trust this violates and/or what statutory requirements have been violated. Please file verified supplement setting forth the above information.

8. File verification. California Rule of Court, rule 7.103(b).

RECOMMENDATION:

Require correction of notes.

(/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0700519

CASE NAME: SHELLEY KAE MCNAMEE

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

DONALD PAUL MCNAMEE (PET)...GRESHAM SAVAGE NOLAN & TILDEN
SHELLEY KAE MCNAMEE (DEC)...

GENERAL INFORMATION

Continued from 01/16/08 at request of counsel to file Inventory and Appraisal. Nothing new filed.

Continued from 3/17/08 at request of counsel to file petition to terminate for lack of assets as home was foreclosed. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Hearing re I&A.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters issued 8/8/07, \$167,000 bond.
2. Need Final I&A.

RECOMMENDATION

When an inventory and appraisal is not filed as ordered, the court may set hearing in accord with Pr. C. §§ 8804 and/or 8505.

Clerk to notify bonding company.

(/kra).

Future Hearing Dates:

9/17/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0700645

CASE NAME: GUSTAVO R PAREJA

HEARING:
Petition for FINAL DISTRIBUTION ON WAIVER OF ACCOUNTING

| | |
|------------------|-----------------|
| | COUNSEL: |
| SERGIO PAREJA | (PET)...PRO/PER |
| LEANNA PAREJA | (PET)...PRO/PER |
| GUSTAVO R PAREJA | (DEC)... |

No file available for review.

FUTURE HEARING DATES:
10/20/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0701052

CASE NAME: RAYMOND JOSEF BOYKO AND VIRGINIA MILLEN BOYKO

SEE ALSO COMPANION FILE E1 PAGES 59 & 60

HEARING:
Hearing Re: Family Allowance.

COUNSEL:
C TERESA DRIVER (PET)...THOMAS W DOMINICK
LETICIA M ANDERSON-BOYKO (RES)...LAW OFFICE OF FELIX M MARTIN

No file available for review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0800329

CASE NAME: MTR OF DANIEL A COLANGELO

HEARING:

Petition for Letters of Admin. W/ Limited Authority under IAEA

COUNSEL:

CYNTHIA LEIGHTON (PET)...DARIN W BARBER
DANIEL A COLANGELO (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. Need duties and Liabilities form.
3. All heirs waive bond.

RECOMMENDATION:

RFA subject to notes 1-2, no bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/22/08** and for Accounting Review on **7/27/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0800341

CASE NAME: MELVIN JEROME PLEWINSKI

HEARING:

Petition for Probate, Letters of Tstmnty with full authority
under IAEA.

COUNSEL:

RUSSELL PLEWINSKI (PET)...PHILIPSON & ERDMIER
MELVIN JEROME PLEWINSKI (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. Will waives bond. Petitioner is a Virginia resident; bond normally will be required of nonresident personal representatives even when will waives bond Pr.C.§8571. Estimated estate value is \$242,000 consisting of real and personal property. However, petitioner is the sole heir. JTD

RECOMMENDATION:

RFA subject to notes 1 & 2, court's determination re bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/22/08** and for Accounting Review on **7/27/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0800345

CASE NAME: SOPHIA M. JANES

SEE RELATED PROBATE CASE #SCSS02072 PAGE 22 IN E2

HEARING:

Petition for Probate, Letters of Tstmnty with full authority
under IAEA.

COUNSEL:

LARRY JANES

SOPHIA M JANES

(PET)...HARTNELL LISTER & MOORE

(DEC)...

GENERAL INFORMATION

Ex-parte orders denied 4/15/08

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. Need notice of Petition to Administer Estate and proof of service
3. Will waives bond.

RECOMMENDATION:

RFA subject to notes 1 & 2, no bond. If approved, set future hearings for filing of Inventory
& Appraisal on **12/22/08** and for Accounting Review on **7/27/09**. Any accounting to be filed
30 days in advance. Note requirements of local rule 20-908.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS03583

CASE NAME: MTR OF MEYON S. GAINES SPECIAL NEEDS TRST

HEARING:

Petition for INSTRUCTIONS TO THE TRUSTEE TO DIRECT THAT MONEY BE
RELEASED FROM TRUST ETC

COUNSEL:

MELODIE Z. SCOTT (TEE)...HARTNELL HORSPOOL & FOX
SAMUEL SEGURA (HARTNELL HORSPOOL & FOX)...HARTNELL
CONNIE ADAMS (PRO/PER)...PRO/PER
BOND SERVICES OF CALIFORNIA (PRO/PER)...PRO/PER
JAMES H. BROWN (JAMES B CHURCH)...JAMES B C
AMERICAN CONTRACTORS INDEMNITY (PRO/PER)...PRO/PER

GENERAL INFORMATION:

Continued from **6/7/07** at request of parties.

Continued from **7/23/07** at request of counsel. Nothing new filed.

Continued from **12-3-07**. See notes on preceding page.

Continued from **12/10/07** to file a substitution of attorney. Nothing new filed.

Continued from **2/4/08** for counsel to locate a PPF to serve as a successor trustee.

Nothing new filed

Continued from 4/14/08 at request of counsel as counsel is ill. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Petition to Direct that Money be Released from Trust and that Trustee be directed to make a gift on behalf of the beneficiary filed by James Brown, Successor Trustee

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner requests authority to purchase a new van for benefit of the beneficiary in the amount of \$50,000. Alternatively, the trustee suggests making a gift of money from the Trust to Connie Adams, mother of the beneficiary, for the purpose of purchasing a new vehicle. The trustee would then ask Connie Adams to carry insurance to cover the liability for this

vehicle. Petitioner further requests that the current vehicle, a 1999 Ford E-150 be traded in for a new vehicle (approx. value \$9,000), or alternatively gift the current van to Connie Adams and reduce the total amount of the gift (i.e., \$50,000 - \$9,000 = \$41,000). Judge to decide. **Court ruled on the issue of the van at the 12-3-07 hearing. See notes on preceding page.**

2. Petitioner believes that the Trust value is inflated by holding assets at their carry value rather than the market value. Thus, affecting the value of the bond. Petitioner requests to gift various items of personalty to Connie Adams: (1) Computer with a carry value of \$1,800 but an estimated fair market value of \$200; (2) Computer Upgrade with a carry value of \$710.72 but an estimated fair market value of \$400; and (3) printer with a carry value of \$532.17 but an estimated fair market value of \$300.

RECOMMENDATION:

Court's discretion.

(/KRA/kra)

FUTURE HEARING DATES:

6/11/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS04863

CASE NAME: ESTATE OF DOLORES A HOOVER

SEE ALSO 10A & 11

HEARING:

Motion re: TO COMPEL FURTHER RESPONSES TO DEMAND FOR ID filed by
Petitioner MELANIE J JOYCE

COUNSEL:

| | | |
|------------------|----------------------|-----------------------|
| ROBERT BROOD | (PET)... | YBARRONDO & PATTERSON |
| DOLORES A HOOVER | (DEC)... | |
| MELANIE J JOYCE | (OBJ)... | FELIX M MARTIN |
| JAMES HOOVER | (THOMPSON & COLEGATE |)...THOMPSON |

No calendar notes will be prepared. Judge to decide.

FUTURE HEARING DATES:

7/24/08 Mandatory Settlement Conference

10/30/08 Readiness Calendar

11/03/08 Court Trial

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS04863

CASE NAME: ESTATE OF DOLORES A HOOVER

SEE ALSO 10 & 11

HEARING:

Motion re: TO COMPEL FURTHER ANSWERS TO FORM INTERROGATORIES
filed by Petitioner MELANIE J JOYCE

COUNSEL:

| | | |
|------------------|----------------------|-----------------------|
| ROBERT BROOD | (PET)... | YBARRONDO & PATTERSON |
| DOLORES A HOOVER | (DEC)... | |
| MELANIE J JOYCE | (OBJ)... | FELIX M MARTIN |
| JAMES HOOVER | (THOMPSON & COLEGATE |)...THOMPSON |

No calendar notes will be prepared. Judge to decide.

FUTURE HEARING DATES:

7/24/08 Mandatory Settlement Conference

10/30/08 Readiness Calendar

11/03/08 Court Trial

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS04863

CASE NAME: ESTATE OF DOLORES A HOOVER

SEE ALSO 10 & 10A

HEARING:

Motion re: TO COMPEL FURTHER ANSWERS TO SPECIAL INTEROGS filed
by Petitioner MELANIE J JOYCE

COUNSEL:

| | | |
|------------------|----------------------|-----------------------|
| ROBERT BROOD | (PET)... | YBARRONDO & PATTERSON |
| DOLORES A HOOVER | (DEC)... | |
| MELANIE J JOYCE | (OBJ)... | FELIX M MARTIN |
| JAMES HOOVER | (THOMPSON & COLEGATE |)...THOMPSON |

No calendar notes will be prepared. Judge to decide.

FUTURE HEARING DATES:

7/24/08 Mandatory Settlement Conference

10/30/08 Readiness Calendar

11/03/08 Court Trial

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS04997

CASE NAME: EST OF GLENN PAUL BULLOCK

HEARING:

Hearing Re: Proof of blocked account/recorded deeds.

COUNSEL:

CHARISSA L BULLOCK (PET)...RONALD W ASK
GLENN PAUL BULLOCK (DEC)...
PATRICIA L LAYNG (TP)...PRO/PER
BOND SERVICES OF CALIFORNIA (PRO/PER)...PRO/PER
RONALD ASK (RONALD W ASK)...RONALD W

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Proof of deposit into blocked account and
recordation of deeds

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 3/17/08 court approved the 2nd & final account and distribution. Court ordered distribution to the minor beneficiary by placing all monies into a blocked account in c/o Attorney Skoretz. Also, petitioner is to execute a quitclaim deed as to the real property in Llano, CA and Attorney Skoretz will hold title to the real property as custodian for the minor.
2. No proof of deposit into blocked account.
3. No proof of recordation of deed.

RECOMMENDATION

Inquire status. When documents are not filed as ordered, court may set a hearing in accord with Pr.C.§8505.

(kra)

FUTURE HEARING DATES:

3/16/09 Hearing re Final Discharge

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06627

CASE NAME: IN RE THE RONALD R CRANDALL LIVING TRUST

HEARING:
Hearing Re: CREDITOR'S CLAIM.

| | |
|----------------|------------------------|
| | COUNSEL: |
| LAURI DE VRIES | (PET)...E. JOAN NELMS |
| JAMES E CONTI | (PET)...WARREN J SMALL |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Creditor claim

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Creditor claim filed by Special Administrator, Lauri Vries, on 11/15/05 against decedent's estate for child support in the amount of \$39,988.00. As Letters of special administration were issued 11/1/05 it appears the claim is timely filed.
2. The clerk mailed notice of this hearing to counsel. The Court may in its discretion require the creditor to file a petition and give notice of hearing per Pr.C.§9252. JTD

RECOMMENDATION:
Court's discretion
(kra)

FUTURE HEARING DATES:
6/25/08 Hearing Re: Status.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06801

CASE NAME: EST OF ROSA L BLACKWELL

HEARING:
Accounting Review

COUNSEL:
PATRICIA BLACKWELL (PET)...MARTIN E KELLER
ROSA L BLACKWELL (DEC)...

GENERAL INFORMATION

Continued from **4/5/07, 6/21/07, 8/2/07, 10/11/07 and 12/6/07** at request of counsel to clear notes. Nothing new filed.

Continued from **2/21/08** at request of counsel to finish preparing accounting. Court states there will be no more continuances. Nothing new filed.

Continued from 4/14/08 at request of counsel. Counsel states that they are waiting for withdrawal of creditor claims. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of Administration issued 2/3/06, no bond.
2. No Accounting and/or status report is filed.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq. There is no bonding company to notice.
(/gls/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

PUBLIC GUARDIAN

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: CONPS0700174

CASE NAME: DOROTHY REENTS

HEARING:

Petition for ALLOWANCE OF COMPENSATION TO CONSERVATOR AND TO HER
ATTORNEY

COUNSEL:

PUBLIC GUARDIAN
DOROTHY REENTS

(CPE)...COUNTY COUNSEL
(CEP)...SCOTT SOADY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner was appointed temporary conservator on 8/1/07 and general conservator on 12/21/07. Petitioner alleges that petitioner and counsel rendered services prior to the appointment and for a period of 90 days after appointment for which petitioner and counsel have not been compensated. The services included and investigation of appropriateness of conservatorship, preparing and filing of the petition for appointment, locating and marshaling conservatee's assets, and coordinating proper placement for conservatee.
2. Petitioner requests compensation of \$350.00 and County Counsel request fees of \$40.00. An partial I&A valued as of 12/21/07 is filed showing sufficient assets for the fee request.

RECOMMENDATION:

Court's discretion.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: CONPS0700210

CASE NAME: MARISA DUARTE

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARISA DUARTE (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 1/25/08 matter came on for a non-appearance placement review. PG indicated that the conservatee's mother, Leticia Coronel, has come forward and wishes to be appointed s successor conservator for her daughter. PG does not object and counsel for conservatee submits on the motion. However, no Petition for Appointment of Successor Conservator, Duties or consent filed by Leticia Coronel. Court may wish to set OSC re Why Orders/Letters appointing successor should not be set aside and a formal Petition for Appointment be filed.
2. On 1/25/08 court appointed successor conservator. However, no compliance review or accounting review was set.
3. On 1/25/08 Court relieved PG as conservator and ordered a final accounting to be filed. No accounting filed.

RECOMMENDATION:

Court's determination re note 1.

Court to set hearings as to successor conservator (see note 2): compliance review for **6/2/08** and Accounting review for **4/6/09**.

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SC SS00521

CASE NAME: IN THE MATTER OF VIVIAN VERTIN

HEARING:
Accounting Review

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| | COUNSEL: |
| VIVIAN VERTIN | (CEP)... |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 5/14/07 court approved the 11th account; 12th accounting now due covering the period 12/12/06 – 12/11/07.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SC SS01049

CASE NAME: IN THE MATTER OF SHIRLEY REBECCA ANN FRICK

HEARING:
Accounting Review

COUNSEL:
SHIRLEY REBECCA ANN FRICK (CEP)...
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 7/30/07 court approved the 12th account; 13th accounting now due covering the period 3/10/07 – 3/9/08.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SC SS01852

CASE NAME: MTR OF ROBERT WHITE

HEARING:
Accounting Review

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|-----------------|----------------------------|
| | COUNSEL: |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| ROBERT WHITE | (CEP)...MELVIN L FRIEDLAND |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 5/14/07 court approved the 5th account; 6th accounting now due covering the period 11/28/06 – 11/27/07.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SC SS03159

CASE NAME: MTR RE LINNIE E TOWNSEND

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

| | |
|-------------------|------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| LINNIE E TOWNSEND | (CEP)... |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 8/24/06 – 1/11/08.
2. Assets on hand \$132,658.02 consisting of cash, real property and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Disbursement shows payment to Ed Lampro in the amount of \$750 for reimbursement of 2years of dog care. Question where the dog is being cared for as conservatee has been in a care center since 2004, and will conservatee continue paying for the care of the dog? Need verified supplement
5. Public Guardian and County Counsel request fees of \$2,207.00 each.

RECOMMENDATION:

Need to clear note 4. If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 1/12/08 – 1/11/09. Any accounting to be filed 30 days in advance.
(kra).

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SG SS5942

CASE NAME: IN THE MATTER OF JAMES PERRENOUD

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JAMES PERRENOUD (CEP)...

GENERAL INFORMATION:

Continued from 3/17/08 at request of counsel to file an accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 3/12/07 court approved the 33rd account; 34th accounting now due covering the period 7/28/06 – 7/27/07.
2. No accounting filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.
(kra).

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SG SS7739

CASE NAME: IN THE MATTER OF JOHN F SEHLHORST

HEARING:

TWENTY-FOURTH Account and Report of PUBLIC GUARDIAN and Petition
for allowance of fees filed.

COUNSEL:

| | |
|------------------|------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| JOHN L SEHLHORST | (CEP)... |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 24th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 8/1/06 – 1/11/08.
2. Assets on hand \$1,987.06 consisting of cash and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$172.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 1/12/08 – 1/11/09. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS00148

CASE NAME: IN THE MATTER OF GEORGE ANTHONY NOVAK

HEARING:

ELEVENTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

GEORGE ANTHONY NOVAK (CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 11th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 8/31/06 – 11/7/07.
2. Assets on hand \$5,816.17 consisting of cash and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$204.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 11/8/07 – 11/7/08. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS00531

CASE NAME: IN THE MATTER OF CHARLES SODARO

HEARING:
SEVENTH Account and Report of PUBLIC GUARDIAN and Petition for
allowance of fees filed.

COUNSEL:
CHARLES SODARO (CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

No file available for review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS00937

CASE NAME: IN THE MATTER OF JANIS BARRETT

HEARING:
Hearing re Final Discharge

| | |
|-----------------|---------------------------------|
| | COUNSEL: |
| JANIS BARRETT | (CEP)...HARTNELL HORSPOOL & FOX |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final accounting approved 5/14/07. New conservatorship established 7/21/06.
2. As the only asset remaining in the estate was a \$300 automobile, which has been accounted for in the new conservatorship, does court wish to require a receipt for the \$300 automobile. JTD
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 2655.

(kra)

FUTURE HEARING DATES:

1/26/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS01467

CASE NAME: MATTER OF THOMAS ZAREMBA

HEARING:
SECOND AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
THOMAS ZAREMBA (CEP)...HARTNELL HORSPPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 2nd & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 2/1/07 – 2/1/08.
2. Conservatorship established under W&I 5350 and terminated on 9/28/07.
3. Assets on hand \$241.00 consisting of cash.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel request fees of \$120.50 each.
6. Petitioner has distributed \$237.32 to Thomas Zaremba, Conservatee, representing the final distribution of conservatee's estate. Need receipt for distribution made to conservatee on 12/11/07.

RECOMMENDATION:

If approved court to set hearing re filing receipts and final discharge for **6/1/09**
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS01526

CASE NAME: MTR RE: MITCHELL DAVIS

HEARING:
Accounting Review

| | |
|-----------------|---------------------------------|
| | COUNSEL: |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| MITCHELL DAVIS | (CEP)...HARTNELL HORSPOOL & FOX |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 5/14/07 court approved a waiver of account on the 7th account; 8th accounting now due covering the period 3/27/07 – 3/26/08.
2. No accounting or waiver of accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS01822

CASE NAME: MTR OF JANET EKEMA

HEARING:
Accounting Review

| | |
|-----------------|---------------------------------|
| | COUNSEL: |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| JANET EKEMA | (CEP)...HARTNELL HORSPOOL & FOX |

No file available for review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02108

CASE NAME: MTR OF STEVEN VICTOR

HEARING:

FIFTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN
STEVEN VICTOR

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL HORSPPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 5th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 7/20/06 – 1/31/08.
2. Assets on hand \$6,897.44 consisting of cash and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$474.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 2/1/08 – 1/31/09. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02258

CASE NAME: MTR OF KEVIN HAYES

HEARING:
Accounting Review

| | |
|-----------------|---------------------------------|
| | COUNSEL: |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| KEVIN HAYES | (CEP)...HARTNELL HORSPOOL & FOX |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 5/14/07 court approved the 1st account; 2nd accounting now due covering the period 8/8/06 – 8/1/07.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02430

CASE NAME: MTR OF CARRIE SILVA

HEARING:

FOURTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

| | |
|-----------------|---------------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| CARRIE SILVA | (CEP)...HARTNELL HORSPOOL & FOX |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 8/2/06 – 2/1/08.
2. Assets on hand \$480.91 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$120.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 2/2/08 – 2/1/09. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02616

CASE NAME: MTR OF SANDRA MC KINLEY

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
SANDRA MC KINLEY (CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION:

Second Account is due for the period: 12/19/06 – 12/18/07

Continued from 2/28/08 at request of counsel to file an accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. No accounting is filed.

RECOMMENDATION:

If continued, court may wish to set on a Monday calendar (the day other PG matters are heard). When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(gls)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02688

CASE NAME: MTR RE NELLY RAMIREZ

HEARING:

THIRD Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

| | |
|-----------------|------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| NELLY RAMIREZ | (CEP)... |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 3rd account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 10/3/06 – 10/22/07 (12 months).
2. Assets on hand \$331.84 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Receipts indicate only 3 months of SSI payments and 1 retro that averages to 5 months of payments. As this is a 12 month accounting question why only 8 months of SSI payments are accounted for. Need verified supplement.
5. Public Guardian and County Counsel request fees of \$66.00 each.

RECOMMENDATION:

Need to clear note 4. If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 10/23/07 – 10/22/08. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02820

CASE NAME: MTR RE ROBIN RASMUSSEN

HEARING:

FIRST AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

| | |
|------------------|------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| ROBIN RASMUSSEN | (CEP)... |
| VIVIAN RASMUSSEN | (CPE)...PRO/PER |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 2/18/05 – 12/7/07.
2. Conservatorship established under W&I 5350 and terminated on 2/3/06.
3. Zero assets on hand.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel waive compensation.

RECOMMENDATION:

If approved court to set hearing re final discharge for **6/1/09**
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02868

CASE NAME: MTR RE JAMES DEVITA

***VACATED- Petition for ORDER THAT CONSERVATOR NEED NOT PRESENT
SECOND ANNUAL ACCOUNT FILED AND IS SET FOR 6/02/08.***

HEARING:
Accounting Review

PUBLIC GUARDIAN COUNSEL:
JAMES DEVITA (CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LISTER & MOORE

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02910

CASE NAME: MTR RE MILDRED TELLEZ

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MILDRED TELLEZ (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION:

Continued from 2/25/08 at request of counsel to file an accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. 1st accounting approved 4/30/07. Conservatorship terminated 7/6/07.
2. No accounting filed. Need final accounting.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.
(/cbr/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02964

CASE NAME: MTR RE GILBERT ROMERO

HEARING:

SECOND Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

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|-----------------|---------------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| GILBERT ROMERO | (CEP)...HARTNELL LISTER & MOORE |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 2nd account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 10/24/06 – 12/4/07.
2. Assets on hand \$1,733.97 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$433.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 12/5/07 – 12/4/08. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02969

CASE NAME: MTR RE RODNEY COLEMAN

HEARING:
Accounting Review

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| | COUNSEL: |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| RODNEY COLEMAN | (CEP)...HARTNELL LISTER & MOORE |

GENERAL INFORMATION:

Continued from 2/25/08 at request of counsel to file an accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. 1st account approved 12/3/07. Conservatorship terminated 11/16/07.
2. No accounting filed. Need final accounting.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.
(/cbr/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS03019

CASE NAME: MTR RE RAUL GUZMAN

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
RAUL GUZMAN (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

2nd account is due for the period: 1/7/07 – 1/6/08

Continued from 2/25/08 at request of counsel to file an accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. No accounting filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.
(gls/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS03059

CASE NAME: MTR RE URSULA UNKNOWN

HEARING:

Petition for ORDER THAT CONSERVATOR NEED NOT PRESENT SECOND
ANNUAL ACCOUNT

COUNSEL:

| | |
|-----------------|---------------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| URSULA UNKNOWN | (CEP)...HARTNELL LISTER & MOORE |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Waiver of account (Pr.C.§2628)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 2nd accounting period 5/2/07 – 4/10/08.
2. Public Guardian petitions for waiver of accounting as a matter of law per Pr.C.§2628 on basis assets are less than \$7,500 and income was less than \$1,000 exclusive of public benefits.
3. No oppositions filed at the time of review of this file.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 4/11/08 – 4/10/09. Any accounting to be filed 30 days in advance.
(kra)

FUTURE HEARING DATES:

7/07/08 Accounting Review (may be vacated as a waiver of account is now before this court)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS03073

CASE NAME: MTR RE JASON WALKER

HEARING:
FIRST AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JASON WALKER (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 4/7/06 – 4/10/07.
2. Conservatorship established under W&I 5350 and terminated on 5/5/07.
3. Zero assets on hand.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel waive compensation.

RECOMMENDATION:

If approved court to set hearing re final discharge for **6/1/09**
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS03120

CASE NAME: MTR RE ALDEN LANTZ

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ALDEN LANTZ (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

Continued from **12-6-07**. No one appeared and court continued matter. Clerk gave notice to the Public Guardian.

Continued from **12/17/07** at request of counsel. Nothing new filed.

Continued from 3/17/08 at request of counsel to file a final accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Matter set at the time set for hearing re court trial on 9/7/07; Court denied petition for reestablishment of conservatorship and ordered PG to file an accounting.
2. No accounting filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS1143

CASE NAME: MTR OF ALINDA SHINAULT

HEARING:

FOURTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

| | |
|-----------------|---------------------------------|
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| ALINDA SHINAULT | (CEP)...HARTNELL HORSPOOL & FOX |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 10/26/06 – 2/5/08.
2. Assets on hand \$4,059.32 consisting of \$309.32 in cash and the balance in a ½ interest in a mobile home.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$1,000.00 each. As there is minimal cash in the estate, question how petitioner proposes payment will be made? JTD

RECOMMENDATION:

Court's determination re note 4. If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 2/6/08 – 2/5/09. Any accounting to be filed 30 days in advance.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS1862

CASE NAME: IN THE MATTER OF BILLY RAY

VACATED- ACCOUNTING FILED AND IS SET FOR 06/02/08.

HEARING:
Accounting Review

| | |
|-----------------|---------------------------------|
| PUBLIC GUARDIAN | COUNSEL: |
| BILLY RAY | (CPE)...COUNTY COUNSEL |
| | (CEP)...HARTNELL HORSPOOL & FOX |

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS4154

CASE NAME: IN THE MATTER OF BETTY JANE MEIER

HEARING:

SIXTEENTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

BETTY MEIER (CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 16th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 2/3/06 – 11/19/07.
2. Assets on hand \$169.32 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$35.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 11/20/07 – 11/19/08. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS5519

CASE NAME: MTR OF SHARI SMITH

HEARING:

fourth Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN
SHARI SMITH

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 6/8/06 – 1/11/08.
2. Assets on hand \$5,068.66 consisting of cash and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$517.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 1/12/08 – 1/11/09. Any accounting to be filed 30 days in advance.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS5916

CASE NAME: IN THE MATTER OF KATHERINE EVANS

VACATED- ACCOUNTING FILED AND IS SET FOR 06/02/08.

HEARING:
Accounting Review

| | |
|-----------------|---------------------------------|
| | COUNSEL: |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| KATHERINE EVANS | (CEP)...HARTNELL HORSPOOL & FOX |

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS6393

CASE NAME: KATHRYN D'SOUZA

HEARING:
Accounting Review

| | |
|-----------------|---------------------------------|
| | COUNSEL: |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |
| KATHRYN D'SOUZA | (CEP)...HARTNELL LISTER & MOORE |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 1/25/08 court granted the Petition for rehearing and termination of the conservatorship. Need accounting covering 6/12/07 – 2/25/08.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS7908

CASE NAME: IN THE MTR OF NORA SMILEY

HEARING:
Accounting Review

| | |
|-----------------|------------------------|
| | COUNSEL: |
| NORA M SMILEY | (CEP)... |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 8/27/07 court approved the 6th account; 7th accounting now due covering the period 3/14/07 – 3/13/08.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS7980

CASE NAME: IN THE MTTR OF JOSE RAMIREZ

HEARING:

FOURTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

JOSE RAMIREZ (CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
OFFICE OF DISTRICT ATTORNEY/ C(TP)...OFFICE OF THE DISTRICT ATTORNE
CHINO SUPERIOR COURT/ SAN BDNO(OFFICE OF THE DISTRICT
ATTORNE)...OFFICE OF

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 6/28/06 – 6/7/07.
2. Assets on hand \$2,259.04 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. disbursements show 2 payments totaling \$608.00 to SSI for overpayment of 4/07 & 5/07. However, receipts do not reflect any extra income payments from SSI. Need clarification; file verified supplement.
5. Public Guardian and County Counsel request fees of \$565.00 each.

RECOMMENDATION:

Need to clear note 4. If approved court to set next hearing re Accounting Review for **6/1/09**. Accounting to cover the period of 6/8/07 – 6/7/08. Any accounting to be filed 30 days in advance.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

CONSERVATORSHIP

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: CONPS0700123

CASE NAME: DELMER MILLER

HEARING:

Hearing Re: Conservatorship Complaine Review.

COUNSEL:

| | |
|---------------|---------------------------|
| ROGER BUTLER | (PET)...HORSPOOL & PARKER |
| DELMER MILLER | (PCE)...E JOAN NELMS |

GENERAL INFORMATION:

Letters of Conservatorship (estate only) issued 8/20/07

Continued from **1/14/08** at request of counsel at the assets are being located.

Continued from 3/17/08 Oral reports given by Attorneys Horspool and Nelms.

THIS CASE IS SET FOR HEARING ON Conservatorship Compliance Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Conservatorship were recorded on 9/17/07.
2. No inventory is filed.
3. Court Investigator 6 month report in file. Court should review same.

RECOMMENDATION:

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

(gls/kra)

FUTURE HEARING DATES:

10/27/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: CONPS0700191

CASE NAME: LUIS VILLANUEVA AREOLA

HEARING:

Hearing Re: Conservatorship Compliance Review (Care Plan).

COUNSEL:

GEORGINA DE VILLANUEVA (CPE)...PRO/PER
LUIS VILLANEUVA ARREOLA (CEP)...WALTER T MOORE

GENERAL INFORMATION:

Continued from 4/14/08. Court re-appointed Walter Moore for conservatee. Court instructs Moore and DeVillanueva to personally be present and the next hearing. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Conservatorship Compliance Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Conservatorship of the Person only was granted 10/11/07.
2. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Statement of Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION:

When documents are not filed as ordered, court may set a hearing in accord with Pr.C.§2655.
(cbr/kra/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: CONPS0700213

CASE NAME: BRYAN MICHAEL HURD

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of STEPHEN P ADAMS

COUNSEL:

| | |
|--------------------|-------------------------|
| STEPHEN P ADAMS | (CP)...J |
| GLENNA M ADAMS | (CP)...J |
| AMBER R HURD | (CP)...J |
| BRYAN MICHAEL HURD | (CTP)...NOREEN FONTAINE |

VACATE HEARING - proof of service of Conservatee's rights filed.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: CONPS0700227

CASE NAME: MTR OF MONIQUE SHANTE TAYLOR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANDREA L JONES-TAYLOR

COUNSEL:

ANDREA L JONES-TAYLOR (CP)...PRO/PER
MONIQUE SHANTE TAYLOR (CTP)...NOREEN FONTAINE
JERRY TAYLOR (CP)...PRO/PER

GENERAL INFORMATION:

**Continued from 4/14/08 at request of counsel to file proof of service (note 2).
Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Conservatorship Compliance review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Court appointed Andrea Jones-Taylor and Jerry Taylor co-conservators of the person on 1/7/08.
2. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
3. As Conservatee is developmentally disabled and receiving benefits from the IRC, no Care Plan required per Pr.C.§2352.5(e).

RECOMMENDATION

When documents are not filed as ordered, court may set a hearing in accord with
Pr.C.§2655
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: SC SS02771

CASE NAME: MTR RE BRUCE WHITING

HEARING:
Accounting Review

COUNSEL:
LINDA WHITING (CPE)...JAMES B CHURCH
BRUCE WHITING (CEP)...WALTER T MOORE
BOND SERVICES OF CALIFORNIA, L(TP)...
MICHAEL ANTHONY WHITING (SAMUEL CUBETE)...SAMUEL CU

No file available for review

FUTURE HEARING DATES:
6/26/08 Readiness Calendar
6/30/08 Court Trial

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: SC SS02799

CASE NAME: MTR OF BETTY JOY SAPP

SEE ALSO 55 & 56

HEARING:
Hearing re: Inventory and appraisal

COUNSEL:
NORVEL F HANSPARD (CP)...PRO/PER
MICHAEL W HANSPARD (CP)...PRO/PER
BETTY JOY SAPP (CTP)...ROGER WALKER

See notes on following page (matter #55).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: SC SS02799

CASE NAME: MTR OF BETTY JOY SAPP

SEE ALSO 54 & 56

HEARING:
OSC re: Sanctions

COUNSEL:
NORVEL F HANSPARD (CP)...PRO/PER
MICHAEL W HANSPARD (CP)...PRO/PER
BETTY JOY SAPP (CTP)...ROGER WALKER

GENERAL INFORMATION:

Continued from **5/17/07, 7/5/07, 8/30/07 and 10/25/07**. Court suspends co-conservators and notifies Public Guardian re possible appointment as successor. County counsel requested continuance. Note: LPS conservatorship proceedings in Riverside and that a waiver of accounting may be appropriate.

Continued from **12/20/07** at request of all parties. Nothing new filed.

Continued from 2/25/08. Citation issued to Norvel Hanspard to show why an I&A and accounting are not filed. Nothing new filed.

Continued from 4/14/08 at request of court. Oral report given by Edith Rogers. Court instructs Edith Rogers to personally serve or have courtroom bailiff personally serve Norvel Hanspard with court citation. Citation issued to Norvel Hanspard to personally appear. Nothing new filed.

THIS CASE IS SET FOR HEARING ON OSC re sanctions for non-appearance and failure to file inventory and appraisal.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Amended letters of person and estate issued 6/23/06.
2. No inventory is filed (overdue by more than a year). Pursuant to initial petition for appointment, estimated value of conservatorship estate is \$0.00.

3. Copies of prior minute orders addressed to conservators were returned as undeliverable.
4. Per Court Investigator's report filed 6/8/06, conservatee indicated a desire to object to the conservatorship when estate powers were requested. The court appointed Attorney Roger Walker and the conservatorship of the estate was granted on 6/23/06.
5. Confidential Report filed by PG re possible appointment as successor conservator.
6. Court Investigator's report is filed (tabbed).
7. Ex-parte petition to dispense with accounting per Pr.C. §2628 submitted for court approval. Court should require petitioner to file an inventory prior to approval to dispense with accounting.
8. **Need return of citation issued 4/15/08.**

RECOMMENDATION:

Court's discretion.

(/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: SC SS02799

CASE NAME: MTR OF BETTY JOY SAPP

SEE ALSO 54 & 55

HEARING:
Accounting Review

COUNSEL:
NORVEL F HANSPARD (CP)...PRO/PER
MICHAEL W HANSPARD (CP)...PRO/PER
BETTY JOY SAPP (CTP)...ROGER WALKER

See notes on prior page (matter #55).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: SLCSS03000

CASE NAME: MTR RE WALTER SCHWARZ

SEE ALSO 58

HEARING:
Hearing re: Inventory and appraisal

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
WALTER SCHWARZ (CEP)...HARTNELL LISTER & MOORE
DAVID WALTER SCHWARZ (CPE)...ATTY JOHN WELCH

See notes on following page (matter #58).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 10:30 DEPT: E1

CASE #: SLCSS03000

CASE NAME: MTR RE WALTER SCHWARZ

SEE ALSO 57

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
WALTER SCHWARZ (CEP)...HARTNELL LISTER & MOORE
DAVID WALTER SCHWARZ (CPE)...ATTY JOHN WELCH

THE PG IS NOT PART OF THIS CASE AT THIS TIME. DAVID WALTER SCHWARZ IS THE CONSERVATOR.

GENERAL INFORMATION:

Continued from **7/16/07** at request of counsel.
Continued from **7/30/07** at request of counsel. Counsel states bonds total \$400,000.
Continued from **9/24/07** at request of counsel. Nothing new filed.
Continued from **11/5/07** with additional bond to be posted in the amount of \$37,000.
Continued from **1/14/08** at request of court as counsel states that additional bond is posted and awaiting proof.

Continued from 3/17/08 at request of counsel to file a corrected I&A and an accounting.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Conservator was appointed on 2/10/06.
2. Inventory filed with assets totaling in excess of \$2,000,000 of which \$436,309.13 is in cash. Petitioner states that the bond of \$100,000 is sufficient. Hearing re I&A continued to 7/30/07 for bank statements. Court may wish to set OSC re bond sufficiency. Bond of \$400,000 is posted. However, the I&A shows

- \$436,309.13 in cash. Court ordered increased bond of \$37,000 on 11/5/07. Need to post additional bond. **Bond of \$37,000 posted.**
3. **Original bank statements filed in support of I&A. However, the bank statements and corresponding values listed on the inventory do not reflect the balances as of the date of appointment of 2/10/06. Need corrected inventory with bank statements supporting the asset values as of date of appointment.**
 4. No accounting filed. Need accounting covering the period: 2/10/06 – 2/9/07.

RECOMMENDATION:

Need corrected I&A and accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2. Clerk to notice bonding company (/gls)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

MISC.

DATE: 05/19/08 TIME: 1:30 DEPT: E1

CASE #: PROPS0700895

CASE NAME: MTR OF RAYMOND JOSEF BOYKO

SEE ALSO 60 & COMPANION FILE E1 PAGE 5

HEARING:

Court Trial -- Estimated trial length *** hrs.

COUNSEL:

C TERESA DRIVER (PET)...FULLERTON LEMANN SCHAEFFER & D
RAYMOND JOSEF BOYKO (DEC)...
LETICIA BOYKO (PET)...WILLIAM M NASSAR & ASSOCIATES
STATE OF CALIFORNIA FRANCHISE (TP)...

No calendar notes as this is on for Court Trial.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 1:30 DEPT: E1

CASE #: PROPS0700895

CASE NAME: MTR OF RAYMOND JOSEF BOYKO

SEE ALSO 59 & COMPANION FILE E1 PAGE 5

HEARING:
Petition for FOR PAYMENT OF FAMILY ALLOWANCE

COUNSEL:
C TERESA DRIVER (PET)...FULLERTON LEMANN SCHAEFFER & D
RAYMOND JOSEF BOYKO (DEC)...
LETICIA BOYKO (PET)...WILLIAM M NASSAR & ASSOCIATES
STATE OF CALIFORNIA FRANCHISE (TP)...

No file available for review.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 1:30 DEPT: E1

CASE #: RPRRS03075

CASE NAME: DEVINE FAMILY TRUST

SEE ALSO 62

HEARING:
Court Trial -- Estimated trial length 0:00 hrs.

| | | |
|----------------|-------------------|--------------------------------|
| | COUNSEL: | |
| JAMES R DEVINE | (PET)... | SOHEILA S AZIZI & ASSOCIATES P |
| SUSANNE LONG | (OBJ)... | SCOTT D BROWN |
| KENNETH LONG | (SCOTT D BROWN |)...SCOTT D B |
| MARK DEVINE | (DANIEL J. CRONIN |)...DANIEL J. |

No calendar notes as this is on for Court Trial.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/19/08 TIME: 1:30 DEPT: E1

CASE #: RPRRS03075

CASE NAME: DEVINE FAMILY TRUST

SEE ALSO 61

HEARING:

FIRST Account and Report of JAMES R DEVINE and Petition for allowance of fees filed.

COUNSEL:

| | | |
|----------------|-------------------|--------------------------------|
| JAMES R DEVINE | (PET)... | SOHEILA S AZIZI & ASSOCIATES P |
| SUSANNE LONG | (OBJ)... | SCOTT D BROWN |
| KENNETH LONG | (SCOTT D BROWN |)...SCOTT D B |
| MARK DEVINE | (DANIEL J. CRONIN |)...DANIEL J. |

GENERAL INFORMATION Accounting covers 12-20-05 through 11-30-07

Assets: \$222,617.66 cash

Continued from **2-19-08**. At the time of the hearing the parties stipulated to consolidation of 2 competing petitions. Counsel to provide stipulation. Not filed. Nothing new filed.

Continued from 4/1/08.

THIS CASE IS SET FOR HEARING ON first accounting and report of trustee.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner has submitted photocopies of bank statement. See yellow tab for 11-30-07 bank statement.
2. Petitioner paid \$3,000 to counsel during this accounting period.
3. Petitioner alleges that expenses incurred are listed at Exhibit E. There is no Exhibit E, rather the expenses are listed at Exhibit C.
4. In the disbursements the petitioner lists a \$500,000 payment to American Select without explanation. Under Assets on Hand at the beginning of the accounting period it lists investment in American Select and says to see Exhibit F for projected cash return. There is no Exhibit F. There is a statement on projections of a \$220,720 investment that I have marked with a yellow tab. However, that is not the

amount that is alleged to have been invested. Also the investment is not listed in the assets on hand at either the beginning or ending schedules.

5. There is no explanation of the payments to Soheila Azizi & Assoc.
6. The remainder of the disbursements appear to be self explanatory.
7. Proof of service is to opposing counsel only, rather than the actual beneficiaries.
Did court wish to require notice to the beneficiaries in accord with the requirements of the code?
8. Opposition has been filed. Matter is contested.

RECOMMENDATION:

Matter is opposed and should be set down on the contested calendar.

(/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN **PROBATE**

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0600336

CASE NAME: ROBERT PAUL YAYA

HEARING:
Accounting Review

COUNSEL:
ROBERT G YAYA (PET)...FULLERTON LEMANN SCHAEFER & DO
ROBERT PAUL YAYA (DEC)...
INHERITANCE FUNDING COMPANY, I(TP)...STEVEN D SCHROEDER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 3/12/07, \$235,000 bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

Clerk to notice bonding company.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700352

CASE NAME: CHARLES WATSON THORNTON

HEARING:
Waiver of account and for final distribution.

COUNSEL:
BRADLEY D THORNTON (PET)...PRO/PER
CHARLES WATSON THORNTON (DEC)...

No file available for review

FUTURE HEARING DATES:
8/12/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700522

CASE NAME: MTR OF JACK G PRYOR

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

MARQUETA TURNER (PET)...PRO/PER
JACK G PRYOR (DEC)...

GENERAL INFORMATION

Continued from **2/11/08** at request of court. No appearance. Clerk mailed notice. Nothing new filed.

Continued from 4/7/08. Court rejects petitioner's I&A submitted today as improper and directs petitioner to obtain and file the proper form and show appraisal of property as of date of death of decedent. Nothing new filed.

THIS CASE IS SET FOR HEARING ON filing of Inventory and Appraisal.

THE FOLLOWING ISSUES AND /OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Letters of administration issued 8/6/07, no bond required.
- 2 Inventory and Appraisal not filed. Need final Inventory and Appraisal.

RECOMMENDATIONS:

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

(vet/kra/kra)

FUTURE HEARING DATES:

10/20/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700542

CASE NAME: ROSE L SCOTT

HEARING:
Hearing re: Inventory and appraisal

| | |
|-----------------|-----------------|
| | COUNSEL: |
| BARBARA J DAVIS | (PET)...PRO/PER |
| ROSE L SCOTT | (DEC)... |

No file available for review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700560

CASE NAME: MTR OF JEFFREY FLOYD BONNEY

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

ALTA REA BONNEY (PET)...WALTER SCOTT
JEFFREY FLOYD BONNEY (DEC)...

GENERAL INFORMATION:

Continued from 4/14/08. No appearance. Clerk mailed notice. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 11/14/07, no bond required.
2. No inventory filed. Need Final I&A.

RECOMMENDATION;

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.

(kra)

FUTURE HEARING DATES:

12/08/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700574

CASE NAME: TEMPIE LEE WILLIAMS

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

LESTER WILLIAMS SR (PET)...OLLIE
TEMPIE LEE WILLIAMS (DEC)...
DEPARTMENT OF HEALTH CARE SERV(TP)...
MARION WARD WILLIAMS (LAYNE A BARTHOLOMEW)...LAYNE A B
TINA Q WILLIAMS (LAYNE A BARTHOLOMEW)...LAYNE A B
KATHERINE L HODGE (LAYNE A BARTHOLOMEW)...LAYNE A B

GENERAL INFORMATION:

Continued from **3/6/08**. No appearance. Court sets OSC re Sanctions. Clerk mailed notice to counsel. Nothing new filed.

**Continued from 4/14/08 at request of counsel. OSC re Sanctions Dismissed.
Nothing new filed.**

THIS CASE IS SET FOR HEARING ON filing Inventory and Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued 8/30/07 (limited authority, no bond)
2. No inventory is filed (overdue by 2 months)

RECOMMENDATION:

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.

(gls/kra)

FUTURE HEARING DATES:

11/06/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700694

CASE NAME: ARDESTER SCOTT GARDNER

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

RANDY SCOTT (PET)...STANLEY Z WHITE & ASSOCIATES
ARDESTER SCOTT GARDNER (DEC)...

GENERAL INFORMATION:

Continued from 4/14/08. No appearance. Clerk mailed notice as court requires legal description and APN per Local Rule. Nothing new filed.

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final I&A filed. However, real property listed in item 1 on attachment 2 must be described by the legal description and assessors parcel number per local rule 20-610. Need verified supplement or corrected I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.

(kra)

FUTURE HEARING DATES:

12/08/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR
HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800110

CASE NAME: ALVIN WILBOURN

HEARING:

Spousal Property Petition hearing.

COUNSEL:

BONGHEE WILBOURN (PET)...PRO/PER

ALVIN WILBOURN (DEC)...

GENERAL INFORMATION:

Continued from 4/14/08 at request of petitioner to clear notes. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Spousal property petition

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Decedent died intestate leaving one issue (minor 10 years of age) and surviving spouse/petitioner. Petitioner requests confirmation of property belonging to petitioner.
2. Petitioner alleges the 3 parcels located in San Bernardino, CA, that are currently held in decedent's name alone, were held in the name of decedent's corporation or in petitioner's name, but were transferred by a quitclaim or interspousal deed prior to decedent's death into decedent's name.
3. Petitioner attaches a transaction history for two of the properties, but not the third. The transaction histories do not reflect petitioner's name on these properties at any time. Need copies of the deeds.
4. Attachment 7a is incomplete as to the legal description of "property two". Need verified supplement.
5. Petitioner fails to set forth any facts that would allow the court to make a determination that the assets are community or quasi-community property. As the relief sought is limited to transfer of assets that are either community or quasi-community property such factual allegations are required. Need verified supplement.

RECOMMENDATION:

Need to clear notes.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800336

CASE NAME: THE MONTES DE OCA LIVING TRUST

HEARING:
Petition for ORDER CONFIRMING SUCESSOR TRUSTEE AND TRUST ASSETS

COUNSEL:
CECELIA HOLSINGER (PET)...ROBERT MCCOY JR.

No notes at this time as the file is currently in review by Legal Research.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800342

CASE NAME: HELEN T BOOMER

HEARING:

Petition for Probate, Letters of Tstmnty with full authority
under IAEA.

COUNSEL:

FORREST E BOOMER (PET)...PRO/PER
HELEN T BOOMER (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. Need notice of Petition to Administer Estate and proof of service
3. Will waives bond and all heirs have waived bond.
4. The will is not self proving as the instrument is not witnessed under the penalty of perjury of the state of California. Petitioner files a declaration indicating that petitioner is unable to locate the witnesses. When no subscribing witness is available the court may permit 1) proof of the handwriting of the testator and 2) evidence showing due execution of the will per Pr.C.§8221. Petitioner is the son of decedent, declares personal knowledge of decedent's handwriting, and that upon examination of the will, declares the instrument was signed by the decedent per Pr.C.§8221. Petitioner attaches a copy of decedent's will to show due execution per Pr.C.§8221(b). JTD

RECOMMENDATION:

RFA subject to notes 1 & 2, no bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/22/08** and for Accounting Review on **7/27/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800344

CASE NAME: CAROL J THOMPSON

HEARING:
Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:
ROBIN C THOMPSON (PET)...HARTNELL, LISTER & MOORE
CAROL J THOMPSON (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA, by daughter

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. All heirs waive bond.

RECOMMENDATION:

RFA subject to note 1, no bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/22/08** and for Accounting Review on **7/27/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800346

CASE NAME: SUSIE HAUN DOWLING

HEARING:

Petition for Probate, Letters of Tstmnty with full authority
under IAEA.

COUNSEL:

CHARLOTTE DOLLAR BOYD (PET)...HARTNELL, LISTER & MOORE
SUSIE HAUN DOWLING (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. Will waives bond. However, petitioner is a VA resident. Bond normally will be required of nonresident personal representatives even when will waives bond Pr.C.§8571. Estate is \$385,000 consisting of real property. Does court wish to require full bond (\$385,000) or minimal bond (\$20,000)? JTD

RECOMMENDATION:

RFA subject to note 1, and court's determination re bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/22/08** and for Accounting Review on **7/27/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SC SS02536

CASE NAME: MTR OF BRANDY LITTLES

HEARING:
Accounting Review

| | |
|-----------------|---------------------------------|
| | COUNSEL: |
| VERDELL LITTLES | (CPE)...HARTNELL LISTER & MOORE |
| BRANDY LITTLES | (CEP)...DONNASUE SMITH-ORTIZ |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 5/14/07 court approved the 3rd report & waiver of account; 4th accounting now due covering the period 11/25/06 – 11/24/07.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS04416

CASE NAME: ESTATE OF ERNEST L. DARBY

HEARING:

SECOND CURRENT Account and Report of MINNIE E. DARBY and
Petition for allowance of fees filed.

COUNSEL:

| | | |
|-----------------|----------|--------------------------------|
| MINNIE E. DARBY | (PET)... | WILLIAM J WARD |
| ERNEST L. DARBY | (DEC)... | |
| KAREN HUSTED | (TP)... | FULLERTON LEMANN SCHAEFFER & D |

GENERAL INFORMATION:

Continued from **6/21/07** at request of counsel to file a supplement.

Continued from **8/2/07**. The court orders Minnie Darby not to take any additional distributions. The court authorizing each of the Darby children (excluding Minnie Darby) a \$5,000 distribution and reserves jurisdiction to an additional \$5,000 distribution.

Continued from **9/6/07** at request of counsel to file objections. Nothing new filed.

Continued from **11/8/07** at request of counsel.

Continued from **12/10/07** at request of counsel to review objections of Thomas Dominick.

Continued from **2/11/08** at request of both counsel.

Continued from 4/7/08 as Mr. Hartnell to file final accounting this week and file response to the objections of Thomas Dominick. Court informs counsel that an MSC may be set up by telephone call to the court. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Preliminary Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Letters of Administration issued 8/28/01.
2. Amended accounting is filed.
3. Petitioner alleges in the first account current that certain parcels of real property were community property and should be distributed to petitioner. The court agreed and the property was distributed. The real property was

rental income property and the rental income/expenses were not maintained in a separate account and petitioner periodically withdrew funds to make repairs and provide support to herself. This practice ended in March, 2006. The account represents that the disbursements may have exceeded petitioner's entitlement by \$22,742.87. Petitioner requests a further preliminary distribution be made to all beneficiaries and should funds be determined to be owed by petitioner to the estate, that they be deducted from such sum. Petitioner requests a further distribution of \$35,000 to herself and \$5,000 to each of the children of decedent. (Court previously ordered such distribution on 8/2/07.)

4. Petitioner does not indicate what additional steps are necessary to conclude the estate. From the last status report filed 11/16/06, there were unresolved taxes from 1986-2001 which petitioner was seeking a CPA to assist resolving the matter. Question if the estate is close to being resolved? File verified supplement.
5. **Objections filed. Matter is contested. Proof of service of objection filed.**

RECOMMENDATION:

Need supplemental accounting and need to clear note 4. Matter is contested and needs to be set down on the contested calendar.

(/kra/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS05082

CASE NAME: MTR OF NELSON SPECIAL NEEDS TRUST

HEARING:

THIRD Account and Report of LIZ NELSON and Petition for allowance of fees filed.

COUNSEL:

LIZ NELSON (PET)...LENITA A SKORETZ
EVERETT NELSON (OBJ)...AARON CHARLE GREGG

GENERAL INFORMATION:

Accounting covers period: 12/3/02 – 12/31/06

Assets on hand: \$929,599.74 (real property of \$320,930.32, cash of \$96,429.59, annuity of \$490,738.37 and the balance in personal property)

Continued from **1/10/08** at request of counsel to clear notes. Nothing new filed.

Continued from **2/25/08** at request of counsel. Court is informed that objector, Everett Nelson passed away and Attorney Gregg will not be appearing. Nothing new filed.

Continued from 4/14/08 at request of counsel.

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Allowance of Fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner waives fees as trustee for this accounting period.
2. Attorney requests fees of \$5,837.50. Billed at \$250/hour for attorney time and \$75/hour for paralegal time. Itemized.
3. On receipts schedule on 12/29/05 there is a miscellaneous deposit from Inland Empire Escrow for \$100,000 which is noted ("refinance the house to get Evette needed cash now loan to daughter"). Question if a loan was made to the trust beneficiary's daughter? If so, under what authority does the trust provide for this transaction? File verified supplement.

4. On disbursements, there are several expenditures made which are questionable "special needs" items which require verified supplement for clarification. They are as follows:
- (a) Bank of America – penalties for early withdrawal totaling \$524.09. Why was it necessary to incur penalties for early withdrawals?
 - (b) Union Bank of California – returned check charges \$2,796.97. Need explanation for such a large amount of returned check charges.
 - (c) Home decorating totaling \$3,175.71. Question how this is applicable to the special needs of the trust beneficiary?
 - (d) 12/6 and 12/22/06 Atlantis Construction totaling \$4,690.00. Question what construction/work was completed?
 - (e) 12/9/04 – Lowe's \$2,557.24. What was purchased? Need itemization.
 - (f) Moving expenses totaling \$3,740.81. Question how this charge is applicable to the special needs of the trust beneficiary?

RECOMMENDATION:

Need to clear notes.

(gls/kra/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS06610

CASE NAME: EST OF VELLO KULBIN

HEARING:

FIRST AND FINAL Account and Report of T ELIZABETH KULBIN and
Petition for allowance of fees filed.

COUNSEL:

T ELIZABETH KULBIN (PET)...CRAIG M PARKER
VELLO KULBIN (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & final account and petition for fees and final
distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Statutory fees are \$4,600.00. Petitioner waives compensation.
2. The estate contains only real property to be distributed in kind.

RECOMMENDATION:

RFA. If approved, court to set hearing re filing receipts and final discharge for **6/1/09**.
(kra)

FUTURE HEARING DATES:

8/28/08 Hearing re Final Discharge

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS06870

CASE NAME: ESTATE OF DAVE THOMAS JR.

HEARING:
Hearing re Final Discharge

COUNSEL:
RICHARD M. HARMON (PET)...WILSON, WILSON & PERRIZO
DAVE THOMAS JR (DEC)...

GENERAL INFORMATION

Continued from 12/17/07. No appearance. Court sets OSC re sanctions.
On 2/4/08 OSC dismissed; Orders presented to the court; Matter taken under submission.
Court rules on 2/25/08 that the proposed order was reviewed, rejected and returned for
correction. Hearing re final discharge re-set.

Continued from 4/14/08. No appearance. Clerk mailed notice. Nothing new filed.

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 12/11/06 court approved final distribution.
2. Need order approving first & final accounting.
3. Receipt of distribution filed.
4. Need Ex-parte petition/order for final discharge.

RECOMMENDATION

Need to clear notes 2 & 4. When receipts or final discharge order are not filed as ordered,
court may set a hearing in accord with Pr.C. § 8505.
(/KRA/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS07002

CASE NAME: ESTATE OF JENNIE M. GRAVES

HEARING:
Hearing Re: Receipts and Final Discharge.

COUNSEL:
RUTH L. HENRICKS (PET)...JACK B OSBORN
JENNIE M. GRAVES (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final accounting approved 5/14/07.
2. Need receipts for distribution.
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS07082

CASE NAME: ESTATE OF BETTY JO ARCENEUX

HEARING:
Accounting Review

COUNSEL:
JOSEPH ARCENEUX (PET)...EDWARD B FISCHER
BETTY JO ARCENEUX (DEC)...
KELLY ANDERSON (PET)...ROGER VON KAESBORG

No notes at this time as the file is currently in review by Legal Research.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS07162

CASE NAME: MTR OF EVELYN JANE STONE

HEARING:

FIRST Account and Report of LEE P FARMER JR and Petition for fees

COUNSEL:

LEE P FARMER JR (PET)...JAMES ALLEN
EVELYN JANE STONE (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & final account and petition for fees and final distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. The summary of account is incomplete. It cannot be determined whether or not this accounting balances. Need to file proper accounting to comply with Pr.C. §1060
2. Report indicates two creditor claims listed as exhibit A. However, the pages marked exhibit A are not filed in reference to creditor claims. Need list of all creditor claims filed in accord with CRC 7.403 even though all creditor claims have been paid.
3. Need statement of compliance with Pr.C. §9209 re notice to Director of Health Services per local rule 20-907(d)(5).
4. Petitioner alleges petitioner has assigned 30 shares of So. Cal. Edison stock; however, no such assignment is filed. Need assignment.
5. Petitioner alleges that part of the assets subject to this probate are in the possession of the State of California. Question status of claim with the Unclaimed Property Division of the State Controller's office? Alternatively, will claim be distributed in kind to residual beneficiaries? File verified supplement

RECOMMENDATION:

Need to clear notes.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS07294

CASE NAME: ESTATE OF ROBERT G REYNOLDS

HEARING:
Hearing Re: Receipts and Final Discharge.

COUNSEL:
SHERRY LAYMAN (PET)...JAMES B CHURCH
ROBERT G REYNOLDS (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final accounting approved 5/14/07. Need order approving first & final accounting.
2. Need receipts.
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 2655.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

CONSERVATORSHIP

DATE: 05/19/08 TIME: 10:30 DEPT: E2

CASE #: SC SS02072

CASE NAME: MTTR OF SOPHIA MARY JANES

SEE RELATED PROBATE CASE #PROPS0800345 PAGE 8 IN E1

HEARING:
Accounting Review

COUNSEL:

LARRY D JANES (CPE)...LAW OFFICES OF SCOT D STIRLING
SOPHIA MARY JANES (CEP)...MELVIN L FRIEDLAND

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. The 1st & Current account was deemed the Final account and was approved on 3/20/07.
2. Need receipt from personal representative. However, no personal representative has been appointed yet (see PROPS0800345).
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 2655.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/19/08 TIME: 10:30 DEPT: E2

CASE #: SC SS03090

CASE NAME: MTR OF ADA JEAN BRYANT

HEARING:
Accounting Review

COUNSEL:
KIM ANNE SIMMONS (CPE)...CARROLL M LA SON
ADA JEAN BRYANT (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 3/26/08 counsel advises court that a final accounting will be filed covering the period of 6/23/07 – 12/15/07 (date of death).
2. No accounting filed. Need final accounting.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).